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FinancialPlanning

Retirement

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By Rob Burgess
Reporter

The long-awaited Social Security cost-of-living adjustment (COLA) for 2025 was announced Thursday — and it's the smallest in four years.

In theory, these annual adjustments should align with higher prices for goods, making them a lateral shift. However, as anyone who has visited a grocery store in the past few years will attest, inflation does not burn out of the economy evenly. I spoke with advisors about how they're discussing this with clients.

I hope you'll check it out, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Wednesday!

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TOP STORIES

RETIREMENT

'Diet' COLA: Advisors talk to clients about the lowest increase in years

With inflation figures falling, retirees can expect a 2.5% increase in 2025. Here's how planners are guiding clients through the impact of that slight bump.

- **The top 10 best-performing ESG funds of the decade**
  ESG has become more material to over two-thirds of asset owners' investment processes in the previous five years, Morningstar says.
- **The 10 worst-performing ESG funds of the decade**

Criticism of ESG investing has cut across the political spectrum, with accusations ranging from "woke capitalism" on one end, to "greenwashing" on the other.

- **The Ladder: He turned a crypto 'rabbit hole' into a business**
  At 29 years old, Chris King is the CEO and founder of Eaglebrook Advisors in Bethesda, Maryland, a cryptocurrency SMA platform with over $211 million in assets under management.
- **New CFP Board ads incite fierce backlash from advisors**
  The CFP Board of Standards' new "Quite Possibly the Perfect Job" digital campaign targets college and college-bound high school students. Many professionals felt the ads, which depict young people doing anything but working, "missed the mark."

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